

Member Support Specialist I

Supervisor: Member Support Manager

Summary

Responsible for providing excellent member service when answering incoming calls utilizing policies and procedures to resolve member requests and directing calls to a Sr Support Center Specialist or Supervisor when necessary. Performs any special assignments under the direction of the Member Support Manager.

Duties and Responsibilities

- Answers calls daily with emphasis on exceptional member service and accuracy of data input.
- Refers calls to supervisory personnel and other staff as needed. Obtains detailed information on member questions and problems in order to manage call volumes efficiently.
- Listens effectively to member requests and offers support to meet member's needs appropriately and in a timely manner.
- Manages challenging situations efficiently, promptly and professionally.
- Provides assistance regarding:
 - Provide accurate general account information
 - Balance inquiries/transfers
 - Electronic products
 - Address changes
 - Wire transfer requests
 - Debit card research
 - Account closure requests
 - Returned mail
 - Check and statement copies
 - Travel alerts
 - Processing payments
 - Check orders
 - Loan payoffs
 - Process stop pay requests
- Attends work-related courses and seminars and pursue a program of self-development.
- Promotes and educates members of credit union products and services.
- Responsible for following all credit union policies and procedures.
- Responsible for following all rules and regulations including those pertaining to the Bank Secrecy Act.
- Other duties as assigned.

Complexity

This position requires knowledge of all credit union products and services. Individuals should determine the best solution for the member's needs while maintaining a high level of professionalism.

Education and Experience

- High school graduate or equivalent
- Credit union experience helpful but not required
- Support/Call Center or equivalent experience preferred
- Proficient in Microsoft software applications

Skills/Abilities

- Member service focus with an emphasis on excellence
- Excellent communication skills— verbal, written, and listening skills
- Ability to work individually and in a team environment
- High level of focus, attention to detail and accuracy in a repetitive environment
- Ability to manage multiple tasks in a fast paced environment
- Provides friendly, prompt, professional and accurate service and support to all members and associates
- Maintain a dependable record of attendance and timeliness
- Ability to maintain the highest level of confidentiality
- Ability to recognize, research and resolve basic and complex issues
- Ability to make decisions and use judgment within proper authority levels
- Utilize standard office equipment including but not limited to: PC, fax, copier, telephone, postage machine etc.
- Bilingual in Spanish is a preferred skill

Physical/Mental Requirements

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

- Perform primarily sedentary work with limited physical exertion and occasional lifting of up to 20 pounds.
- Must be able to routinely perform work on computer for an average up to 8 hours per day.
- Must be able to work extended hours whenever required or requested.
- The mental demands include: detailed work, reasoning, math, language, written and verbal communications, multiple concurrent tasks.

Job descriptions are not intended to be and should not be construed as a complete list of all duties and responsibilities performed by incumbent, nor do they constitute an employment contract. Duties, responsibilities, and expectations may be added, deleted, or changed at any time at management's discretion.

Effective August 1, 2018